

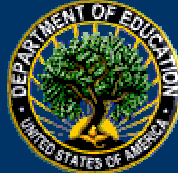


Student Financial Assistance
General Manager, Schools Channel

APPENDIX A-5

Kay Jacks

General Manager, Schools Channel
Student Financial Assistance
U.S. Department of Education



"We Help Put America Through School"

September 14, 2000



Common Origination and Disbursement

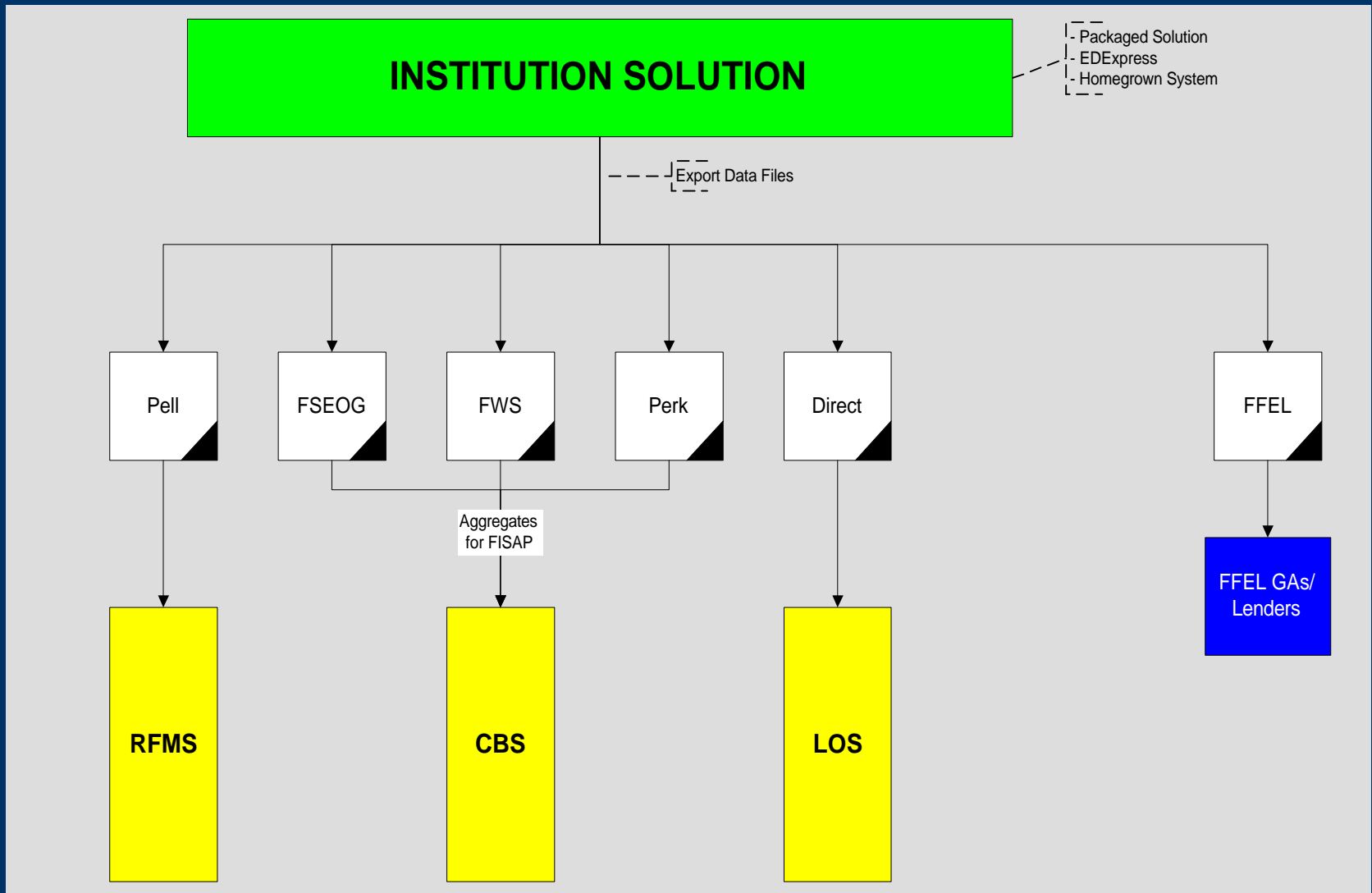
Objectives

- ✓ Common Process across all programs
- ✓ Streamlined process
- ✓ Reduced costs
- ✓ Facilitate real-time sharing of data
- ✓ Integrated customer service
- ✓ Options: reporting, delivery, etc
- ✓ Minimal required changes to schools' internal processes



COD: *Where are we?*

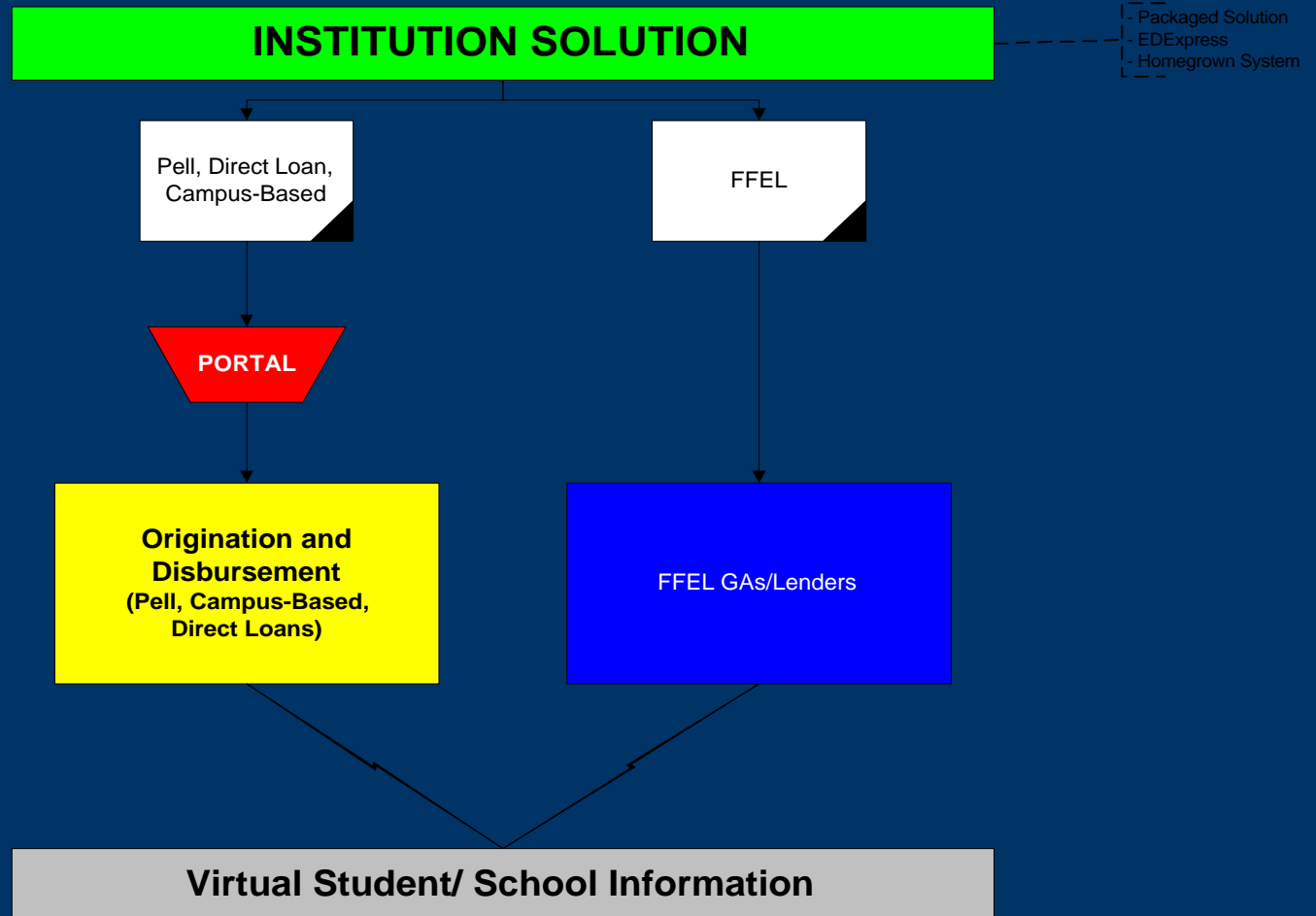
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COD: *Where are we going?*

Common Process



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COD: *Where are we going?*

DATA GOALS AND OBJECTIVES...

- ❖ Shared data definitions across programs

Disbursement Date = Disbursement Date

- ❖ Common edits across programs

General Student & School Eligibility

- ❖ Eliminations of intra-system edits

NSLDS, PEPS ...



COD: *Where are we going?*


DATA GOALS AND OBJECTIVES...

- Full access to student history data for those with the right to know
- Best possible source as close to real-time as possible, eliminating redundancies
- Ease of access
 - Internet based
 - Leverage latest technology for seamless interfaces



Schools Portal

Student Financial Assistance
General Manager, Schools Channel

**Schools Channel**
U.S. Department of Education
Student Financial Assistance

Friday, September 8
"We Help Put America Through School"

HELP SUPPORT FAQs CONTACTS

Optimized for 4.0 Browsers and Above - [Download Here](#)

SFA Links*
Student Data

- [LO-Direct Loan Origination System](#)
- [NSLDS-National Student Loan Data System](#)
- [PELL-RFMS](#)
- [DLSS-Direct Loan Servicing System](#)
- [FAFSA](#)
- [Loan Consolidation](#)

Book Store

- [Bulk Publication Ordering System](#)
- [Technical Publications](#)
- [SFA Download Site](#)

Training/Conferences

- [SFA University \(Training\)](#)
- [SFA Conferences](#)
- [SFA Coach](#)

Reference Library

- [IFAP](#)
- [All SFA Publications](#)
- [SFA Publications \(by topic\)](#)
- [Quality Assurance Program](#)

Participation & Funding

- [Application to Participate and for Recertification](#)
- [GAPS-Grants Administration and Payment System](#)
- [PEPS-Postsecondary Education Participants System](#)

*To return to the portal from an SFA Link, close the browser window.

SFA Headlines
SFA News...

- [Managing the Price of College](#)
- [SFA Performance Plan Progress Report for 2nd Quarter, Fiscal Year 2000](#)
- [Explore the COOL database](#) to find college or career training and compare programs, costs, and academic requirements at more than 9,000 postsecondary schools.

SFA Policy & Rule Changes...

- [Change in dependent students methodology](#)

SFA Search Tool

[Advanced Search](#) [About this Search](#)

My SFA- Sign Up Now!
USERNAME:

PASSWORD:

[PRIVACY STATEMENT](#)
[Customize Your Links!](#)

SFA Calendar

Events	Training	Deadlines	NPRMs
September 2000			
Su 27 3 10 17 24	Mo 28 4 11 18 25	Tu 29 5 12 19 26	We 30 6 13 20 27
Th 31	Fr 1 8 15 22 29	Sa 2 9 16 23 30	

Friday, September 8

- SFA Congressional Briefing

[Got a question?](#) [Portal Feedback](#)



Portal Priorities

Student Financial Assistance
General Manager, Schools Channel

- Content Management
- Links to SFA Web Enabled Systems
- User Customization

The screenshot shows the 'Schools Channel' website for the U.S. Department of Education. The header includes the date 'Friday, September 8' and the slogan 'We Help Put America Through School'. The main content area is organized into several sections:

- SFA Links***: A list of links including LO-Direct Loan Origination System, NSLDS-National Student Loan Data System, Pell-RFMS, DLSS-Direct Loan Servicing System, FAFSA, and Loan Consolidation.
- Book Store**: Links to Bulk Publication Ordering System, Technical Publications, and SFA Download Site.
- Training/Conferences**: Links to SFA University (Training), SFA Conferences, and SFA Coach.
- Reference Library**: Links to IFAP, All SFA Publications, SFA Publications (by topic), and Quality Assurance Program.
- Participation & Funding**: Links to Application to Participate and for Recertification, GAPS-Grants Administration and Payment System, and PEPS-Postsecondary Education Participants System.
- SFA Headlines**: A section for SFA News... with links to 'Managing the Price of College', 'SFA Performance Plan Progress Report for 2nd Quarter, Fiscal Year 2000', and 'Explore the COOL database'. It also includes SFA Policy & Rule Changes... with a link to 'Change in dependent students methodology'.
- SFA Search Tool**: A search interface with a dropdown menu set to 'All SFA Links & IFAP Database', a text input field containing 'cash management', and a 'go' button. It also has links for 'Advanced Search' and 'About this Search'.
- My SFA- Sign Up Now!**: A registration form with fields for USERNAME (containing 'k Jane1') and PASSWORD, a 'go' button, and links for 'PRIVACY STATEMENT' and 'Customize Your Links!'.
- SFA Calendar**: A calendar for September 2000. The current date is Friday, September 8. A yellow highlight is placed on the 8th, with a note 'SFA Congressional Briefing' next to it.

At the bottom of the page, there are two buttons: 'Got a question?' and 'Portal Feedback'.



Links to All Web Enabled Systems



SFA Links*

Student Data

- LO-Direct Loan Origination System
- NSLDS-National Student Loan Data System
- Pell-RFMS
- DLSS-Direct Loan Servicing System
- FAFSA
- Loan Consolidation



My SFA: User Customization



My SFA [Sign Up Now!](#)

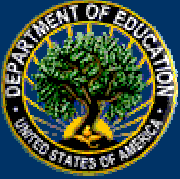
USERNAME

PASSWORD



[PRIVACY STATEMENT!](#)

[Customize Your Links!](#)



Feedback Capability



- Direct access to SFA School Channel

Got a question?

Portal Feedback

- Timely Responses
- Changes Based on Feedback



What's Next: Portal Version 2.0

Student Financial Assistance
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- The Ability To Distinguish User Groups
- Single sign-on
- Integrated Calendar with NASFAA





Status of COD: *Partner Selection*

NEW METHODOLOGY

- **Partner as opposed to contractor**
- **Partner engaged in requirements development as opposed to only design and build**
- **Some detailed requirements will be based upon partner capabilities/ technologies**



Status of COD: *Partner Selection*

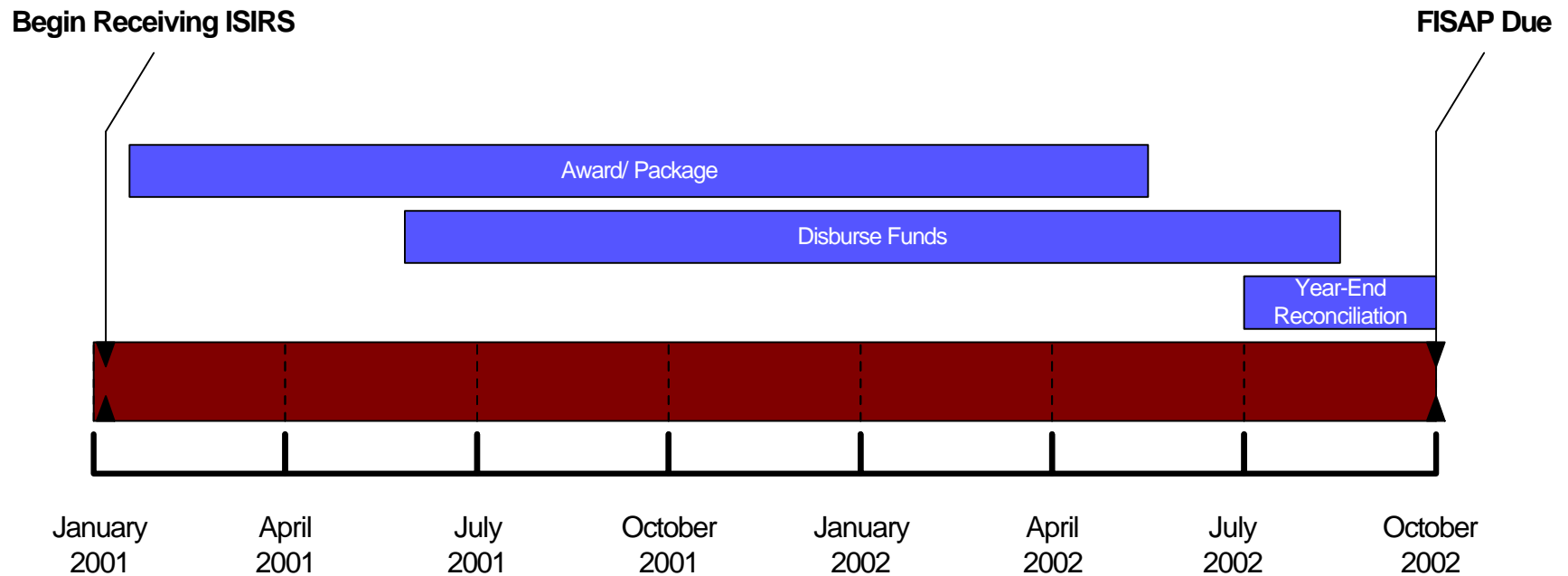
NEW METHODOLOGY

- Off schedule by two months, this has impacted movement on common record, detailed requirements, etc.
- **TOP PRIORITY: Common Record**



School Award Year Timeline

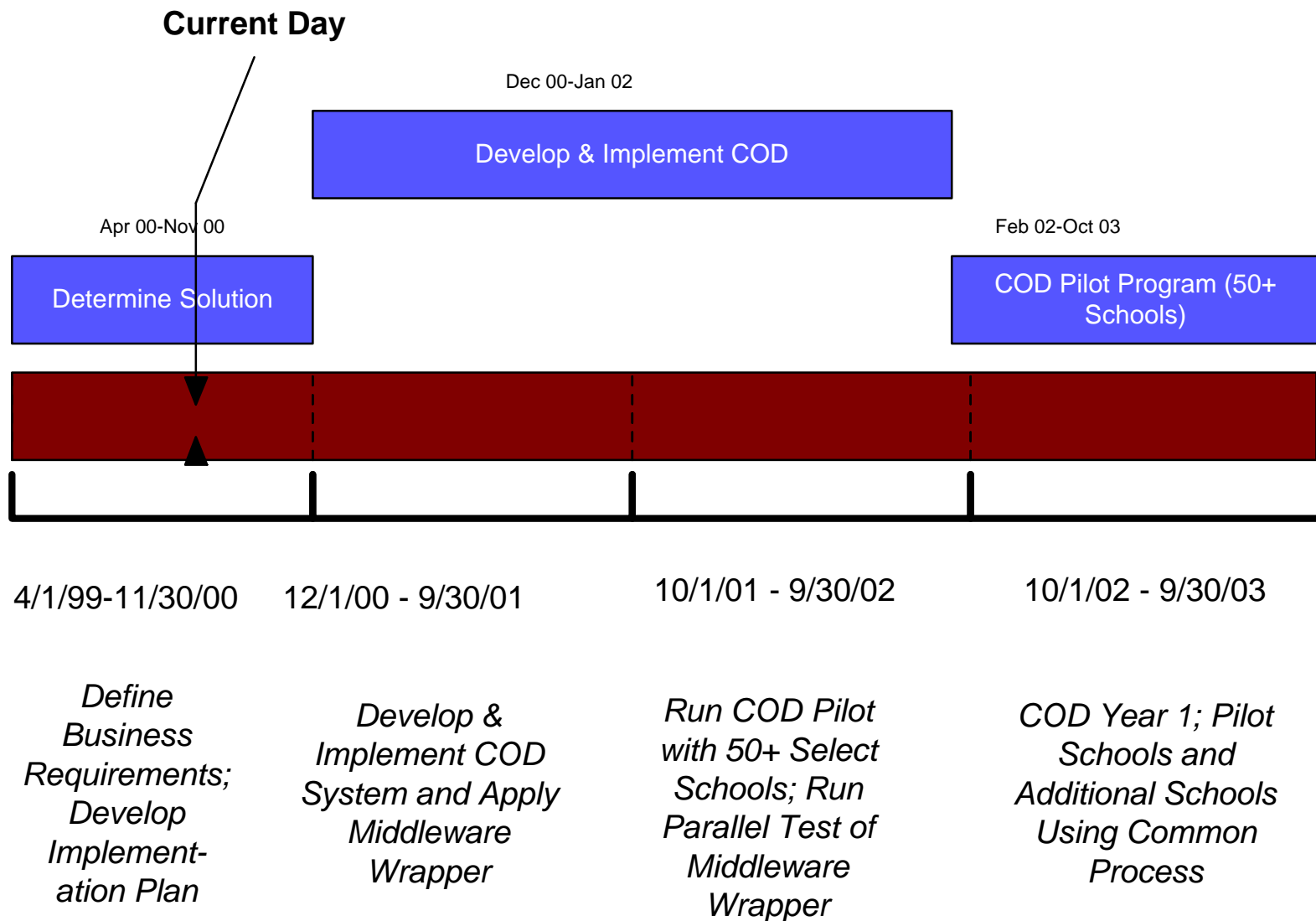
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Status of COD: *Timeframe*

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Status of COD: *Timeframe*

Phase-In Approach

Feb 03-Oct 04

COD Year 1 (est 1000+ Schools)

Feb 04-Oct 05

COD Year 2 (est 2000+ Schools)

Feb 05-Oct 06

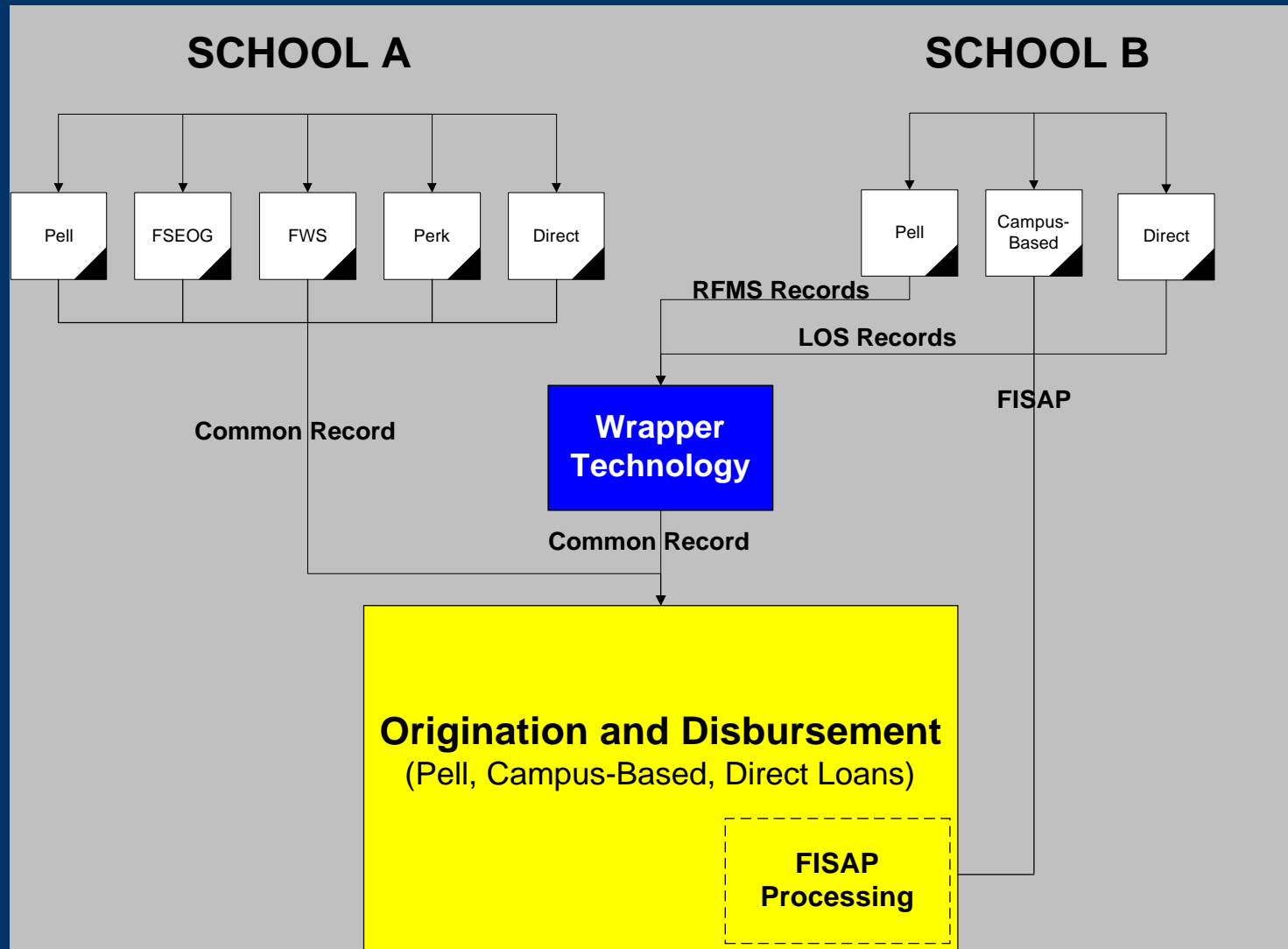
COD Year 3 (est 4000+ Schools)

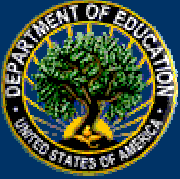
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Transition

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Updates

Student Financial Assistance
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Modified policy in NPRM
to support Just In Time
processing for FFEL



Updates

#	NSLDS Error	Comments/Outstanding Issues	Implementation
1	Field Code: 68	Under the guidelines of HEA 98 this fee is no longer applicable. NSLDS will:	By end of September 2000.
	Field Name: Date of PCA/ Supplemental PCA Flag	1. Remove the requirement to report all fields associated with Pre-Claims	
	Error Codes: All	2. Remove Edits	Applies only to GAs.
2	Field Code: 69	Under the guidelines of HEA 98 this fee is no longer applicable. NSLDS will:	By end of September 2000.
	Field Name: Pre-Claims Assistance (PCA)/Supplemental PCA Flag	1. Remove the requirement to report all fields associated with Pre-Claims	
	Error Codes: All	2. Remove Edits	Applies only to GAs.
3	Field Code: 147	Under the guidelines of HEA 98 this fee is no longer applicable. NSLDS will:	By end of September 2000.
	Field Name: Date of Supplemental-Pre-Claims Assistance Payment	1. Remove the requirement to report all fields associated with Pre-Claims	
	Error Codes: All	2. Remove Edits	Applies only to GAs.
4	Field Code: 148	Under the guidelines of HEA 98 this fee is no longer applicable. NSLDS will:	By end of September 2000.
	Field Name: Amount of Supplemental-Pre-Claims Assistance Payment	1. Remove the requirement to report all fields associated with Pre-Claims	
	Error Codes: All	2. Remove Edits	Applies only to GAs.
5	Field Code: 101	There are several guaranty agencies that do not report data in this field. The regulations for school refunds have changed since the initial population of NSLDS. NSLDS will:	Edit change to be done by the end of September 2000.
	Field Name: Date of Refund to Lender	1. Eliminate this edit	
	Error Code: 525	2. Research the requirements for this field to determine if it should continue to be a NSLDS data element.	Applies only to GAs.
	Error Message: Date must be > preceding date		
			If additional changes are needed, they will be done by end of February 2001.



FAFSA on the Web Redesign

Release 5 -- January 01

Student Financial Assistance
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Highlights

- Add Spanish version of FAFSA on the Web
- Capture PIN at the beginning of the process
- Allow temporary saves to the mainframe database
- Increase usability of school code search
- Change PIN login to allow single authentication to multiple sites
- Expand application status feature to show comments and a link to Corrections on the Web
- Create Application summary page for new applications and renewals





FAFSA on the Web Redesign

Student Financial Assistance
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Release Six and Beyond





FAFSA on the Web Redesign

Customer-Focused Enhancements

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Increase the usability, accuracy, efficiency, scalability, and security of FAFSA on the web.



Students and Parents

- Easier
- Quicker
- Intuitive
- Responsive and Reliable
- Accessible and Easily Saved
- A Complete Aid application and award experience

Schools and Third Party Vendors

- Easy integration
- Data accuracy
- Reduced administrative costs
- Web-enable current stand-alone School Financial Aid application processes



SFA and Customer Service

- Increased work force satisfaction and job productivity
- Quicker problem resolution
- Improved customer service
- Decreased cost with less customer service calls and data entry



FAFSA on the Web Redesign

Release Plan Features

Student Financial Assistance
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Features	Release Five	Release Six	Release Seven Plus
User Experience	Blended	Personalized	Unified
Get EFC	Estimate now, actual in 48 hours	Estimate now, actual in 48 hours	Actual Real Time
Save Work in Progress	Save to server	Prompt to save to server	Auto Save to server
Navigation	Navigate back to work completed	Navigate freely throughout form	Interactive Navigation with CSR
Authentication	PIN	Single authentication	
Other Partners	One-way API (Pre-fill data fields)	Links to state and institution sites	
Student Portal	Independent of	Prepared for	Integrated with